

25 Reports

Introduction to Reports

CMS Net Web has a set of pre-designed reports that users with the appropriate security access can obtain.

Objectives

At the completion of this section, you will be able to:

- Run a report in CMS Net Web
- Print a report in CMS Net Web

25.1 How to Access Reports in CMS Net Web

Notes

1. Click “Reports” on the CMS Net Web toolbar.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Search - Service Authorization

☐ **BY CLIENT**

CCS Number Client Name
Date of Birth Mon Day Year Gender Select
Client Index Number Legal County Select
SSN

☐ **BY PROVIDER**

☐ Hospital / Medical Provider ☐ Special Care Centers ☐ Dental Provider

Provider Name **find >** Provider ID **find >**
Service Begin Date Mon Day Year Service End Date Mon Day Year
SAR Status Select

☐ **BY SAR NUMBER**

SAR Number
Search Clear


2. Find the report you wish to view on the Reports Menu (left hand side of the page).

Notes

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Reports - Please Click on the links below to view reports

- ▶ Provisional Approval Providers
- ▶ PMF Provider Status Update
- ▶ Time From Service Request to Authorization
- ▶ Expiring Authorizations
- ▶ SARS with EPSDT-SS Indicator
- ▶ SARS with CMIP Indicator
- ▶ Alternate Codes
- ▶ Print Authorizations
- ▶ Service Requests Requiring State Approval
- ▶ Service Requests Approval Status


California Department of Health Services

25.2 Reports Available in CMS Net Web

Depending on the security profile of the user who logged in CMS Net Web, there are different reports available for use. Here is a graphic that shows which security profiles have access to each report in CMS Net Web.

	County User	SAR Add, SAR Authorize	Regional Office User	Regional Office Administrator	State Administrator	Provider Management, Provider Approver
Print Authorizations Report	Yes	Yes		Yes	Yes	
Time from Service Request to Authorization Report	Yes	Yes	Yes	Yes	Yes	Yes
Expiring Authorizations Report	Yes	Yes	Yes	Yes	Yes	Yes
SARs with EPSDT-SS Report	Yes	Yes	Yes	Yes	Yes	Yes
PMF Provider Status Update Report	Yes	Yes	Yes	Yes	Yes	Yes
Service Request Approval Status Report		Yes		Yes	Yes	
Provisionally Approved Providers Report				Yes	Yes	Yes
SARs with CMIP Report				Yes	Yes	
Service Requests Requiring State Approval Report					Yes	
Alternate Codes Report					Yes	

Here is a short description for each report.

Report Name	Report Description
Print Authorizations Report	Prints copies of SARs that were authorized over a span of up to seven days for a specified county.
Time from Service Request to Authorization Report	Displays the number of SARs for each reporting category for a specified county or regional office. The tallies report for the number of days between the Service Request Date and the Authorized Date.
Expiring Authorizations Report	Displays a list of SARs that will expire in a given date range for a specified county.
SARs with EPSDT-SS Report	Displays a list of EPSDT-SS SARs for a specified regional office or county.
PMF Provider Status Update Report	Lists all providers (and the SARs associated to those providers) that have become inactive in the PMF.
Service Request Approval Status Report	This report lists the SARs (including the status of the SAR) that require state approval within a county.

Provisionally Approved Providers Report	This report lists all providers with “Provisional Approval” paneling status, that have their Next Review Date within a specified date range.
SARs with CMIP Report	Displays a list of SARs with CMIP indicator.
Service Requests Requiring State Approval Report	This statewide report lists all SARs that need state approval for a time period specified by the user (includes EPSDT-SS or CCS-SS SARs).
Alternate Codes Report	This report displays all SARs that have used a miscellaneous code and entered an alternate code or description for a county.

25.2.1 Print Authorizations Report

SAR #: 97000000680

CONFIDENTIAL
CALIFORNIA CHILDREN'S SERVICES (CCS)
SRO-SACRAMENTO REGIONAL OFFICE
P.O. BOX 997413
MS 8100
SACRAMENTO, CA 95899-7413
TELEPHONE: (916) 327-3100

Authorized Provider: KAISER FOUNDATION HOSP
10800 MAGNOLIA AVE
RIVERSIDE CA 92505-3000

Provider Number: HSP30686F
Telephone: (714) 785-4600

AUTHORIZATION FOR SERVICES

Authorization is for services and effective dates indicated below, in accordance with CCS program policies and fee schedule. Authorization for additional services not listed below must be requested in advance. By providing these authorized services, I agree to accept payment from the CCS program as payment in full. If you have a Service Code Grouping (SCG) authorization, please check your Medi-Cal manual for services included in the SCG.

CCS CLIENT INFORMATION

Client Name: FRANCISCO CARLOS CHAVEZ III
Parent/Guardian: CAMELIA CHAVEZ
Address: 5704 NEWARK
CORCORAN, CA 93212

Client Index Number: 97461633C5
Medi-Cal Number: 16820140248Z01
CCS Case Number: 3331366
DOB: 02/04/1984
Telephone: (559) 992-5234

Primary Diagnosis: 745.4 VENTRICULAR SEPTAL DEFECT
Secondary Diagnosis:

AUTHORIZATION INFORMATION

Effective Dates: 07/01/2004 through 09/01/2004 **Number of days:** 10

SPECIAL INSTRUCTIONS

In order for the CCS program to authorize services timely, please send findings, recommendations, treatment plan and progress reports at least every 6 months. This authorization valid only as long as client is enrolled in Medi-Cal. Family has not signed CCS program papers; therefore, client will not be enrolled in CCS with loss of Medi-Cal coverage.

Please refer to the Medi-Cal manual for billing instructions. Thank you for your continued participation in the California Children's Services Program.

Issued By: MCCARLEY, TRACI (SRO)

Date Authorized: 08/31/2004

SAR #: 97000000680

25.2.2 Time from Service Request to Authorization Report

<Report-Date>

Children's Medical Services (CCS)

Pg 1

<Report-Name>

Reporting for County/Regional Office: (<County> or <Regional-Office>)

Reporting for Date of Service Request <Begin Date entered on the Time from Service Request Report Page> to Authorization Date <End Date entered on the Time from Service Request Report Page>

The Non EPSDT-SS SARs in this column count those in the Treatment Reporting category.		The Non EPSDT-SS SARs in this column count those in the Vendored Therapy Reporting category.		These EPSDT-SS SARs in this column count those in the Treatment Reporting category.		These EPSDT-SS SARs in this column count those in the Vendored Therapy Reporting category.	
↓		↓		↓		↓	
Non EPSDT-SS		Non EPSDT-SS		EPSDT-SS		EPSDT-SS	
Funding Category	Treatment	Vendored Therapy	Treatment	Vendored Therapy	Treatment	Vendored Therapy	Treatment
-15 to -6							
-5 to -1							
0 to 5							
6 to 15							
16 to 30							
31 to 60							
61+							

Each count is determined by calculating the number of days elapsed between the Authorization Date and the Date that the SAR was requested.

- The Service Request Date is entered by the user on the “Enter SAR Information” page.
- The Authorization Date is the date that the “Authorize” button was clicked for the SAR on the “Authorize SAR” tab.

For example, in the first row (=15 to -6), CMS Net Web counts the number of SARs where the number of days elapsed between Date Authorized and Date Requested is between -15 and -6. In other words, this count represents retro-actively authorized SARs the SAR were requested 6-15 days after the date of authorization.

25.2.3 Expiring Authorizations Report

The Expiring Authorizations Report will list authorizations that will expire in the supplied date range.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

Reporting for County: <County>

Reporting for Authorizations expiring between <the first end date entered on the Expiring Authorizations Report Page> and <the second end date entered on the Expiring Authorizations Report Page>

SAR Number	Client Name	CCS No	Provider Name	Service Begin Date	Service End Date
Number assigned by CMS Net Web to the SAR	The name of the client to whom the SAR was issued.	The CCS number of the client to whom the SAR was issued.	The provider that has been associated to the SAR.	The date entered in the "Service Begin Date" field on the Enter SAR Information page.	The date entered in the "Service End Date" field on the Enter SAR Information page.

25.2.4 SARs with EPSDT-SS Report

This report lists all EPSDT-SS SARs (indicated on the Enter SAR Information page) for the county/ region and date range specified.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

<Report-Name>

Reporting for County: <County>

Reporting for Service Begin Date < *Service Begin Date entered on the SARs with EPSDT-SS Report Page* > to Service-End-Date < *Service End Date entered on the SARs with EPSDT-SS Report Page* >

<County>

SAR No	Client Name	Service Begin Date	Service Code	Quantity	Units	Amount	SAR Status	Provider Name	Service End Date	Service Description

25.2.5 PMF Provider Status Update Report

This report will display all providers that have become inactive on the PMF. Along with additional provider information, all SARs associated with the provider will be listed.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

<Report-Name>

Reporting all PMF Provider Status updates on <Date-of-Report>

Provider Number	Provider Name	Provider Type	Status Effective Date	SAR Number
<Provider-Number>	<Provider-Name>	<Provider-Type>	<Effective-Date>	<SAR-Number>
				<SAR-Number>
				<SAR-Number>
				<SAR-Number>
				<SAR-Number>

25.2.6 Service Requests Approval Status Report

This report lists the SARs (including the status of the SAR) that require state approval within a county.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

Reporting for County: <County>

Reporting from Service Begin Date <Service Begin Date entered on the Service Requests Approval Status Report Page > to Service End Date <Service End Date entered on the Service Requests Approval Status Report Page>

SAR Number	Client Name	Approval Status	Category	CCS Number	Service Begin Date	Service End Date
<SAR-Number>	<Client-Name>	<State-Approved>	<SS-Category>	<CCS-Number>	<Service-Begin-Date>	<Service-End-Date>
Number assigned by CMS Net Web to the SAR	The name of the client to whom the SAR was issued.	Values for the SAR: 1. "Pending" for SARs that have not been received State Approval yet. 2. "Not Approved" for SARs where the State Approved value is "No" on the Enter SAR Information page. 3. "Approved" for SARs where the State Approved value is "Yes" on the Enter SAR Information page.	This is the "Category" selected on the Enter SAR Information page.	The CCS number of the client to whom the SAR was issued.	The date entered in the "Service Begin Date" field on the Enter SAR Information page.	The date entered in the "Service End Date" field on the Enter SAR Information page.

25.2.7 Provisionally Approved Provider Report

This report lists all providers with “Provisional Approval” paneling status, that have thier Next Review Date within a specified date range.

<Report-Date>

Children’s Medical Services (CCS)

Pg 1

<Report-Name>

Report from <Begin-Date> to <End-Date>

Provider Name	Provider Number	Next Review Date	Certificate Name
<Provider-Name>	<Provider-Number>	<Provider-Next-Review-Date>	<Certificate-Name>
<Provider-Name>	<Provider-Number>	<Provider-Next-Review-Date>	<Certificate-Name>
<Provider-Name>	<Provider-Number>	<Provider-Next-Review-Date>	<Certificate-Name>
<Provider-Name>	<Provider-Number>	<Provider-Next-Review-Date>	<Certificate-Name>

25.2.8 SARs with CMIP Report

This report lists all CMIP SARs for the county/ region and date range specified.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

Reporting for County: <County>

Reporting from Service Begin Date <Service Begin Date entered on the SARs with CMIP Report Page > to Service End Date < Service End Date entered on the SARs with CMIP Report Page >

<County>

User Name	SAR ID	SAR Status

25.2.9 Service Requests Requiring State Approval Report

This statewide report lists all SARs that need state approval for a time period specified by the user. SARs that need state approval will be EPSDT-SS or CCS-SS with a category that requires state approval.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

Reporting Statewide

Reporting from Service Begin Date <Service Begin Date entered on the Service Requests Requiring State Approval Report Page> to Service End Date <End Date entered on the Service Requests Requiring State Approval Report Page >

<County>

Category	SAR Number	Client Name	CCS Number	Service Begin Date	Service End Date
<SS-Category>	<SAR-Number>	<Client-Name>	<CCS-Number>	<Service-Begin-Date>	<Service-End-Date>
This is the "Category" selected on the Enter SAR Information page.	Number assigned by CMS Net Web to the SAR	The name of the client to whom the SAR was issued.	The CCS number of the client to whom the SAR was issued.	The date entered in the "Service Begin Date" field on the Enter SAR Information page.	The date entered in the "Service End Date" field on the Enter SAR Information page.

25.2.10 Alternate Codes Report

This report displays all SARs within a selected county that have used a miscellaneous code and entered an alternate code or description.

<Report-Date>

Children's Medical Services (CCS)

Pg 1

Reporting for County: <County>

Reporting from Service Begin Date <Service-Begin-Date> to Service End Date <Service-End-Date>

Alternate Code	Miscellaneous Code	User Name	SAR Number	SAR Status
<Alternate-Code OR Alternate Description>	<Service-Code>	<Authorized-By>	<SAR-Number>	<SAR-Status>
	<Service-Code>	<Authorized-By>	<SAR-Number>	<SAR-Status>
	<Service-Code>	<Authorized-By>	<SAR-Number>	<SAR-Status>
<Alternate-Code OR Alternate Description>	<Service-Code>	<Authorized-By>	<SAR-Number>	<SAR-Status>
	<Service-Code>	<Authorized-By>	<SAR-Number>	<SAR-Status>

25.3 Example of how to run the Print Authorization Report.

Notes

25.3.1 Select the Report off the Reports Menu

1. Click the “Print Authorizations” link



25.3.2 Enter the Requested Information on the Reports Page


Notes

1. Select the County for the Print Authorization Report.
2. Enter the beginning date range.
3. Enter the ending date range.
4. Click the “Run Report” button.

Authorization | Provider | Formulary | Procedure Code | Administration | Reports

Print Authorizations

- ▶ Provisional Approval Providers
- ▶ PMF Provider Status Update
- ▶ Time From Service Request to Authorization
- ▶ Expiring Authorizations
- ▶ SARS with EPSDT-SS Indicator
- ▶ SARS with CMIP Indicator
- ▶ Alternate Codes
- ▶ Print Authorizations
- ▶ Service Requests Requiring State Approval
- ▶ Service Requests Approval Status



County * Kings

Date Range

* Apr 19 2004 to

* Apr 25 2004

Run Report **Clear**

25.3.3 View Report Output

1. View the Report Output

SAR #: 97000000680

CONFIDENTIAL
CALIFORNIA CHILDREN'S SERVICES (CCS)
SRO-SACRAMENTO REGIONAL OFFICE
P.O. BOX 997413
MS 8100
SACRAMENTO, CA 95899-7413
TELEPHONE: (916) 327-3100

Authorized Provider: KAISER FOUNDATION HOSP
10800 MAGNOLIA AVE
RIVERSIDE CA 92505-3000

Provider Number: HSP30686F
Telephone: (714) 785-4600

AUTHORIZATION FOR SERVICES

Authorization is for services and effective dates indicated below, in accordance with CCS program policies and fee schedule. Authorization for additional services not listed below must be requested in advance. By providing these authorized services, I agree to accept payment from the CCS program as payment in full. If you have a Service Code Grouping (SCG) authorization, please check your Medi-Cal manual for services included in the SCG.

CCS CLIENT INFORMATION

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Parent/Guardian: CAMELIA CHAVEZ
Address: 5704 NEWARK
CORCORAN, CA 93212

Client Index Number: 97461633C5
Medi-Cal Number: 16820140248Z01
CCS Case Number: 3331366
DOB: 02/04/1984
Telephone: (559) 992-5234

Primary Diagnosis: 745.4 VENTRICULAR SEPTAL DEFECT
Secondary Diagnosis:

AUTHORIZATION INFORMATION

Effective Dates: 07/01/2004 through 09/01/2004 **Number of days:** 10

SPECIAL INSTRUCTIONS

In order for the CCS program to authorize services timely, please send findings, recommendations, treatment plan and progress reports at least every 6 months. This authorization valid only as long as client is enrolled in Medi-Cal. Family has not signed CCS program papers; therefore, client will not be enrolled in CCS with loss of Medi-Cal coverage.

Please refer to the Medi-Cal manual for billing instructions. Thank you for your continued participation in the California Children's Services Program.

Issued By: MCCARLEY, TRACI (SRO)

Date Authorized: 08/31/2004

SAR #: 97000000680

25.3.4 Printing the Report: Set the Report for Landscape (lengthwise) Orientation for Selected Reports

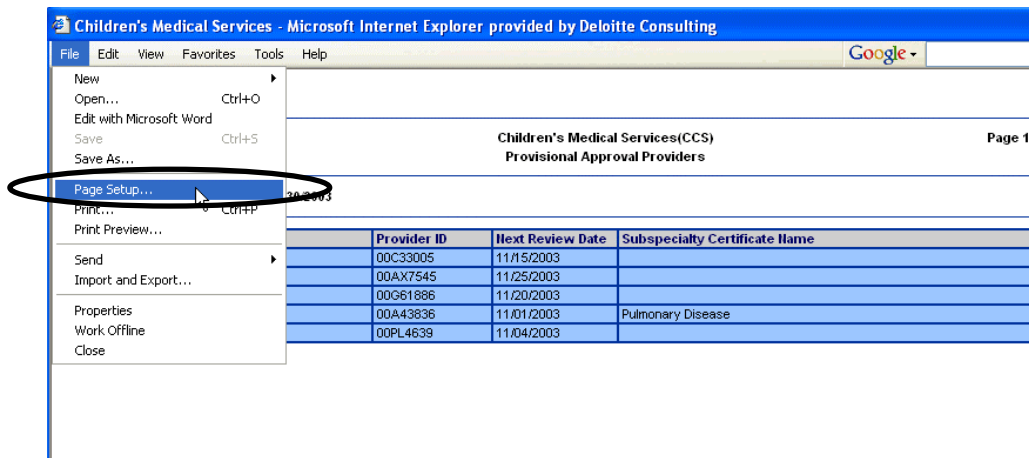
Notes

The following reports are formatted for lengthwise (landscape) on the paper:

- PMF Provider Status Update
- Expiring Authorizations
- SARS with EPSDT-SS Indicator
- SARS with CMIP Indicator
- Alternate Codes
- Service Requests Requiring State Approval
- Service Requests Approval Status

To configure the web-page to print out the report in landscape view, you may follow these steps.

1. On the File Menu, select Page Setup.



2. Search for the “Orientation” group box.
3. Click the radio button for “Landscape” inside the Orientation group box.

Notes

Report Date: 02/25/2004

Children's Medical Services(CCS)
Provisional Approval Providers

Page 1

Report from 11/01/2003 to 11/30/2003

Provider Name	P
GRACE, LAWRENCE J MD INC	00
LAU, JONATHAN B DO	00
SANCHEZ, JOHN H MD INC	00
SIMKIN, JOSEFA F MD	00
THOMAS, ARLO PHD	00

Page Setup

Paper

Size:

Letter

Source:

Automatically Select

Headers and Footers

Header

&w&bPage &p of &P

Footer

&u&b&d

Orientation

Portrait

Landscape

Margins (inches)

Left: 0.75

Right: 0.75

Top: 0.75

Bottom: 0.75

OK

Cancel

Printer...

4. Click OK.

Report Date: 02/25/2004

Children's Medical Services(CCS)
Provisional Approval Providers

Page 1

Report from 11/01/2003 to 11/30/2003

Provider Name	P
GRACE, LAWRENCE J MD INC	00
LAU, JONATHAN B DO	00
SANCHEZ, JOHN H MD INC	00
SIMKIN, JOSEFA F MD	00
THOMAS, ARLO PHD	00

Page Setup

Paper

Size:

Letter

Source:

Automatically Select

Headers and Footers

Header

&w&bPage &p of &P

Footer

&u&b&d

Orientation

Portrait

Landscape

Margins (inches)

Left: 0.75

Right: 0.75

Top: 0.75

Bottom: 0.75

OK

Cancel

Printer...

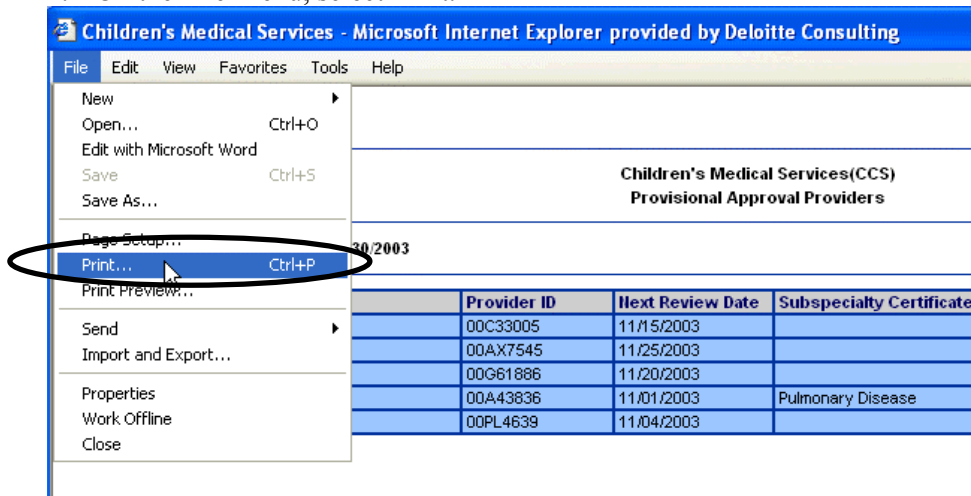
Reports

25-20

Revised: 02/09/05

25.3.5 Now You Are Ready to Print the Report!

1. On the File Menu, select Print.



2. Click "Print" on the Print dialog box.

